

Guidelines and Templates

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Selecting Formats

Most caBIG® documentation is in Microsoft Word or in wiki format. Different formats may be selected based upon the community served, and the preferences of the caBIG® Product Manager. D&T supports alternatives as long as a print-ready version of the documentation can be generated, and the figures contained within that documentation are clearly readable in that format. Here is further information about when different formats may be appropriate for different forms of documentation:

- **Traditional print documents** (such as Word, PowerPoint and PDF) may be best for audiences that will want a printed document, or a document that can be easily e-mailed or sent to others. They are often best for User Manuals and Fact Sheets that will not likely be collaboratively edited by users, or when the writers do not want to open the document up for such editing.
- A **Wiki** might be a better choice when the authors wish to allow for multi-user input and collaboration on the material. This is often the case when the documents are written for a technical audience or an audience comfortable with online editing, or when the content is in flux and would benefit from multiple contributors. CBIIT and caBIG® host wikis on two platforms:
- **Multimedia products** (such as video or flash files) are often best when multiple ways of presenting information (such as text, screencasts, audio or video or both) need to be integrated into a single product. These are often best for communicating to end users that may need information presented in a variety of ways. Included in this category are many forms of self-guided training and demonstrations. [Learn about tools that can be used to create multimedia training/demo products.](#)
- **Forums** are best used when you want an informal way of allowing people to post questions and responses, or comments, in a bulletin board style. Codified knowledge generated or gathered in forums can later be translated into wiki page content, or embedded within formal documentation and training as appropriate.

Tool Outreach and Training Templates

- **caBIG Demo Presentation** - This template is designed to combine slides and a screencast to create a 15-25 minute tool overview demo for end users and for operational decision-makers involved in selecting a tool. Many past demo creators have used either Camtasia or Adobe Connect to create these recorded demos. See [Software Comparison Matrix](#) for guidance on this choice. Note the template script in the notes section of this template - to meet Section 508 requirements, you should script your full demo before recording it.
- **Tool Overview Slides** - This template should be used if you are not recording a demo, but want to provide a summary briefing/overview about a software tool.
- **caBIG Application Overview Training Template** - Designed to give users general information about the application in a format that is longer than a demo or brief educational overview, but which does NOT include hands-on exercises.
- **caBIG Hands-On Training Template** - Designed to give end users of the application practical examples and hands-on exercises.
- [Resources for Trainers](#) walks through the process of creating training modules for caBIG®. Training material templates can be found at the base of this page.

Documentation Templates

The following templates have been reviewed and are sanctioned by the Documentation and Training Workspace:

- **caBIG Developer's Technical Guide Template (Architecture)** - Describes architecture, systems requirements, installation instructions and testing procedures for validating installation, administration logistics, APIs, and other tools that integrate with the software being developed and their implementation. Recommendations are included for customizing the technical guide for your needs. Although the technical guide includes administration and installation information, you may want these to be in separate documents. The template is designed to allow for this breakout.
- **caBIG Application Release Notes Template** - Written just before a product is released, lists new features and functionality and addresses known issues such as bugs and their status. Can also list appropriate documentation and websites.
- **caBIG End User Guide Template** - Includes software authorizations, interface design, protocols, workflow, tools, data sources, database(s), data search, data management, integration with component software, internet access, and using the software/data resource in local environments.

Project Management Templates

All of the following project management templates are included as Attachments to this page. Click on the paper clip icon immediately under the caBIG logo near the top of this page.

- Meeting Agenda Template
- Meeting Notes Template
- Monthly Report for Workspace Participants
- Charter Template
- Project Management Plan Template
- Communication Plan Template
- Staffing Plan Template
- Project Closure Report Template
- After Action Template
- Adoption Lesson Learned Presentation
- How to create a wiki page: UML example; XMI example

Software Development Documentation

All of the following software development documentation templates are included as Attachments to this page. Click on the paperclip icon immediately under the caBIG logo near the top of this page. These are provided for reference only; they have not been reviewed or sanctioned by the Documentation and Training Workspace.

- Use Case Template
- Software Design Description
- UML Model Example
- Software Requirements Management
- Configuration Management Plan
- Risk Management/Matrix Template
- Testing Documents
- Deployment Plan
- Transition Phase Plan Template
- Lessons Learned Template